

Statement of Work

Contract Number: EP-W-11-009/EP-W-11-010/EP-W-11-011

RFO Number 4

I. TITLE: –Sustainable Development and Economic Success

II. PERIOD OF PERFORMANCE

Phase I

From: Date of award

To: January 26, 2012

Phase II

From: January 27, 2012

To: May 31, 2012

III. BACKGROUND

EPA's Smart Growth Program has, for many years, maintained successful relationships with a variety of private sector entities and trade organizations. Some of these entities are Smart Growth Network Partners (SGN), but successful relationships have also been formed with other organizations. The rationale for these partnerships is simple: a wide range of public and private sector actors are necessary to implement sustainable community development approaches. The Office of Sustainable Communities (OSC) has worked with many different private sector partners on projects that serve mutual interests, and this work results in products and information that educate a broad audience both within and outside of the sustainable development community.

For example, *The Business Opportunity for Developers and Production Builders* was produced with the support and contributions of the National Association of Realtors (NAR); the National Association of Industrial and Office Properties (NAIOP); the National Association of Home Builders (NAHB); the National Town Builders Association (NTBA); and home builders Centex, Pulte, DR Horton, and KB Homes, among others. *Market Acceptance of Smart Growth* was developed through work with NAR and NAHB, and *Smart Growth Guidelines for Sustainable Design & Development* was produced with Jonathan Rose Companies, LLC. The *Regional Smart Growth Alliances* were created through a cooperative agreement with the Urban Land Institute (ULI). LEED for Neighborhood Development (LEED-ND), the first national rating system for neighborhood design, was developed with the U.S. Green Building Council (USGBC). Our work with private sector interests has ensured that the policy analysis, technical assistance, education, and outreach that we deliver are grounded in market principles and real-world financial considerations.

With the creation of the OSC, our mission broadened to include serving as the EPA lead in the HUD-DOT-EPA Partnership for Sustainable Communities; demonstrating Agency leadership on sustainable design issues, particularly in codes and standards-setting processes; and carrying out policy analysis on climate change adaptation and mitigation.

In recent years the development industry has witnessed a number of changes, including the foreclosure crisis, a deep recession, job losses, and tightening of the credit markets. These events have impacted the private sector's ability to effectively respond to market demand for higher density, mixed use, and walkable neighborhoods. Moreover, there is closer scrutiny of both public and private investments. To help communities build more sustainably, OSC wants to work with private sector entities to examine the range of market-based opportunities and challenges to implementing sustainable community development approaches.

IV. PURPOSE AND OBJECTIVE

OSC wants to engage private-sector entities to examine the range of market-based opportunities and challenges to implementing sustainable community development approaches to help communities build more sustainably. This objective will be achieved by conducting broad-based discussions with private-sector entities. The outcome of these discussions will result in a series of white papers that identify barriers and ways to overcome those barriers to better assist the private sector to develop more sustainable community development projects. In addition, the white papers will examine whether existing sustainable community design and development policies and projects create a positive impact on local economies and jobs.

V. QUALITY ASSURANCE (QA) REQUIREMENTS

Check [] Yes if the following is required or [x] NO if the following is not required. The Contractor shall submit with their technical proposal a written Quality Assurance Project Plan for any project that is developing environmental measurements or a Quality Assurance Supplement to the Quality Management Plan for any project which generates environmental data using models.

VI. TASKS AND DELIVERABLES

Contractor personnel shall at all times identify themselves as Contractor employees and shall not present themselves as EPA employees. Furthermore, they shall not represent the views of the U.S. Government, EPA, or its employees. In addition, the Contractor shall not engage in inherently governmental activities, including but not limited to actual determination of EPA policy and preparation of documents on EPA letterhead.

PHASE 1

Task 1. Write a White Paper (Under work area II.A.2 – Development and Analysis of Policy Options)

The contractor shall write a white paper (the paper) on how smart growth and sustainable community design policies and projects impact long-term local and regional economic and fiscal goals. Communities across the country are grappling with constrained budgets and are looking for ways to reduce current expenditures and to increase revenue streams.

The paper shall explore the extent to which local and regional development strategies can help with these issues. The contractor shall collaborate with EPA to identify the specific topics to be covered. For each topic the paper shall identify resources and cite case studies spanning the rural to urban continuum in a variety of regions and states.

The Contractor shall access existing studies and reports rather than conducting original research. The paper shall be a minimum of 15 pages and a maximum of 20 pages. The contractor shall submit a complete draft outline to EPA for approval of content and organization 30 calendar days from the date of task order award. The contractor shall submit a complete 1st draft of the paper to EPA 30 calendar days after EPA approval of the draft outline. The contractor shall deliver a complete revised 2nd draft of paper to EPA 30 calendar days after receiving comments from EPA on the 1st draft.

The contractor shall present this paper at two roundtables (see Tasks 2 and 4 within this task order) and shall complete subsequent revisions per Tasks 3 and 5.

Task 2. Convene a Roundtable (Under work area II.C – Communication and Outreach)

The contractor shall convene a one-day roundtable in Washington, DC. The contractor shall work with EPA to determine the exact date for convening this roundtable, but it is expected to be no later than 45 days after receiving EPA comments on the 1st draft of the white paper. The author of the Task 1 white paper shall attend the conference and present the information in the white paper.

The primary objectives of this roundtable are to:

- Receive feedback from stakeholders in the private sector development community on the draft white paper from Task 1;
- Identify and explore challenges and opportunities associated with private sector investment in smart growth and sustainable community design approaches; and
- Identify at least four additional topics for new white papers on related issues relevant to private sector investment and activity in smart growth and sustainable community design approaches.

The contractor's tasks in *preparing* for the roundtable shall include:

- Securing a venue in the Washington, DC area;
- Drafting the agenda with EPA input;
- Identifying and inviting 30 to 50 possible attendees;
- Producing attendee badges and meeting folders; and
- Supplying basic office supplies to run the conference (e.g., flip charts and markers).

EPA will have final approval over the agenda and selection of the venue, attendees, and presenters.

The contractor's tasks *during* the roundtable shall include presenting the draft white paper from Task 1 and soliciting feedback from attendees for revisions to be completed

under Task 3. The contractor shall also facilitate the entire meeting and shall take notes from which to prepare a meeting summary. The meeting summary shall include (1) emerging trends and possible white paper topics that resulted from the meeting discussions and (2) any next steps or actions items to which EPA agreed during the roundtable. The contractor shall provide this summary to EPA within 15 calendar days from the conclusion of the roundtable.

Task 3. Write White Papers (Under work area II.A.2 – Development and Analysis of Policy Options)

The contractor shall complete a 3rd draft of the Task 1 white paper that reflects comments and any new data or information gathered during the Task 2 roundtable. The 3rd draft of this Task 1 paper will be due to EPA within 15 calendar days from the conclusion of the Task 2 roundtable.

The contractor shall write four additional white papers (the papers) on topics identified during the Task 2 roundtable that relate to the challenges and opportunities for private sector investment in smart growth and sustainable community design approaches. The contractor shall collaborate with EPA to identify the topic and specific areas to address in each paper, but EPA will have final approval over these decisions. Each area addressed in the papers shall identify resources and cite case studies spanning the rural to urban continuum in a variety of regions and states.

The Contractor shall access existing studies and reports rather than conducting original research. Each paper shall be a minimum of 15 pages and a maximum of 20 pages. The contractor shall submit a completed draft outline for each paper to EPA for approval within 30 calendar days from the completion of the Task 2 roundtable. The contractor shall submit a complete 1st draft for each paper to EPA 30 calendar days after EPA approval of the draft outlines. The contractor shall deliver complete revised 2nd drafts of the papers to EPA 30 calendar days after receiving comments from EPA on the 1st drafts.

PHASE 2

Task 4. Convene a Second Roundtable (Under work area II.C – Communication and Outreach)

The contractor shall convene a two-day roundtable in Washington, DC. The contractor shall work with EPA to determine the exact date for convening this roundtable, but it is expected to be no later than 45 days after receiving EPA comments on the 1st draft of the Task 3 white papers. The authors of the Task 1 and Task 3 white papers shall attend the conference and present the information in the white papers.

The primary objectives of this roundtable are to:

- Present the revised Task 1 white paper;
- Receive feedback on the draft Task 3 white papers; and

- Build consensus among the participants that the white papers offer credible information to the private sector supporting the idea that smart growth and sustainable community design approaches provide job resiliency, economic development benefits, and achieve other long-term local and regional economic goals.

The contractor's tasks in *preparing* for the roundtable shall include:

- Securing a venue in the Washington, DC area;
- Drafting the agenda with EPA input;
- Identifying and inviting 30 to 50 possible attendees;
- Producing attendee badges and meeting folders; and
- Supplying basic supplies to run the conference (e.g., flip charts and markers).

EPA will have final approval over the agenda and selection of the venue, attendees, and presenters.

The contractor's tasks *during* the roundtable shall include presenting the draft white papers from Tasks 1 and 3 and soliciting feedback from attendees for revisions to be completed under Task 5. The contractor shall also facilitate the entire meeting and shall take notes from which to prepare a meeting summary. The meeting summary shall include (1) emerging trends identified during meeting discussions and (2) any next steps or actions items to which EPA agreed during the roundtable. The contractor shall provide this summary to EPA within 15 calendar days from the conclusion of the roundtable.

Task 5. Prepare Final Deliverables (Under work area II.A.2 – Development and Analysis of Policy Options)

The contractor shall complete the Tasks 1 and 3 white papers, reflecting comments and any new data or information gathered during the Task 4 roundtable. The final drafts of the papers shall be provided to EPA within 30 days from the conclusion of the Task 4 roundtable.

The final deliverables shall conform to the OSC Style Guide (see attached). The contractor shall ensure that EPA has permission to reproduce all images, data, and other content in the reports and that the original sources of all such material are cited. The contractor shall ensure that the final reports are fully copy edited and contain a cover and table of contents such that they are suitable for printing or publication on the web without further modification. To allow for possible modification of the final deliverables by EPA, the contractor shall provide a copy of each white paper in MS Word 2007 and a copy of every image, illustration, graph, chart, spreadsheet etc. found in the white paper in its original source file format.

VII. SCHEDULE FOR DELIVERABLES

The contractor shall provide the following specific deliverables to the EPA Task Order Contracting Officer's Representative (TOCOR):

TASK	DELIVERABLE	DATE DUE (calendar days)
1	white paper outline	30 days after date of contract award
	white paper 1 st draft	30 days after EPA approval of draft outline
	white paper 2 nd draft	30 days after receipt of EPA comments on 1 st draft
2	one-day roundtable	45 days after receipt of EPA comments on 1 st draft
	meeting summary	15 days after conclusion of roundtable
3	Task 1 white paper 3 rd draft	15 days after conclusion of roundtable
	4 white paper outlines	30 days after conclusion of roundtable
	4 white paper 1 st drafts	30 days after EPA approval of draft outlines
	4 white paper 2 nd drafts	30 days after receipt of EPA comments on 1 st drafts
4	two-day roundtable	45 days after receipt of EPA comments on 1 st drafts
	meeting summary	15 days after conclusion of roundtable
5	Tasks 1 & 3 white papers final drafts	30 days after conclusion of roundtable

VIII. MISCELLANEOUS

Software Application files, delivered to the Government, shall conform to the requirements relating to accessibility as detailed to the 1998 amendments to the Rehabilitation Act, particularly, but not limited to, § 1194.21 Software applications and operating systems and § 1194.22 Web-based intranet and internet information and applications. See: <http://www.section508.gov/>

Preferred text format: MS Word, Office 2007

Preferred presentation format: Power Point, Office 2007

Preferred portable format: Adobe Acrobat